



17 October 2022

Dear Valued Client:

Re: The Broker's Workstation and The Underwriter's Workstation – Important Releases and Changes

Custom Software Solutions Inc. (CSSI) is pleased to announce the release of the following enhancements and new features to **The Broker's Workstation (TBW)** and **The Underwriter's Workstation (TUW)**:

Contents

1. [Class of Business Column Added to Expiry Report](#) – The Expiry Report has been improved with a new Class of Business column, which will display the Business Class Code for the policy transaction. In addition, a Class of Business filter has been added to the Expiry Report form.
2. [Improvements to the TBW Update Utility](#) – Improvements have been made to the TBW Update Utility, and you will notice slight changes to the display. Note that user workflows and program functionality have not changed with this enhancement.

1. Class of Business Column Added to Expiry Report

The Expiry Report has been improved with a new Class of Business column, which will display the Business Class Code for the policy transaction. In addition, a Class of Business filter has been added to the Expiry Report form.

To view these enhancements, click **Reports, Expiry Report**. Enter report criteria in the Expiry Report form and click **View** to generate the report.

- For the **Class of Business** filter, select All or a specific business class. All User Defined Codes/Descriptions that have been added in TBW/TUW Lists will be available in the menu (including deleted codes).

Expiry Report

Please enter expiry report criteria below...

Agency Code: All

Branch Code: All

Department Code: All

Class of Business: All

Producer Type: C10 - Class 10, C2 - Class 2, C3 - Class 3, C1 - Class 1

Producer Code: All

Policy Category: All

Report results will display in the Document Window. The Business Class Code selected for the transaction in the policy form will show in the new Class of Business column.

Expiry Report
Reporting Date: October 03, 2022
Created By: Lainey Russell

AcctRep Eff Date	Sub	Pol Type	Bill	Ann Prem	Renewed	Transact	Cancelled	Class of Business
9/15/2022		HOME	A	1,346.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C1
9/9/2022		MOBILE	A	1,102.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C2
9/7/2022	AAAB	COMMPROP	BN	3,285.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C2
8/9/2022	AAAB	COMMPROP	BN	1,100.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C1
7/25/2022		AUTO	A	3,089.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C3
7/17/2022		HOME	A	1,673.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C3

As with other columns in the Expiry Report, click the Class of Business column heading to sort the list by that category. Click the heading again to sort the list in reverse order.

Reporting Date: October 03, 2022
Created By: Lainey Russell

AcctRep Eff Date	Sub	Pol Type	Bill	Ann Prem	Renewed	Transact	Cancelled	Class of Business
10/27/2021		HOME	A	1,020.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C1
11/2/2021		COMMPROP	A	2,975.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C2
11/2/2021		COMMPROP	A	2,975.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C2

Click column heading to sort list by that category

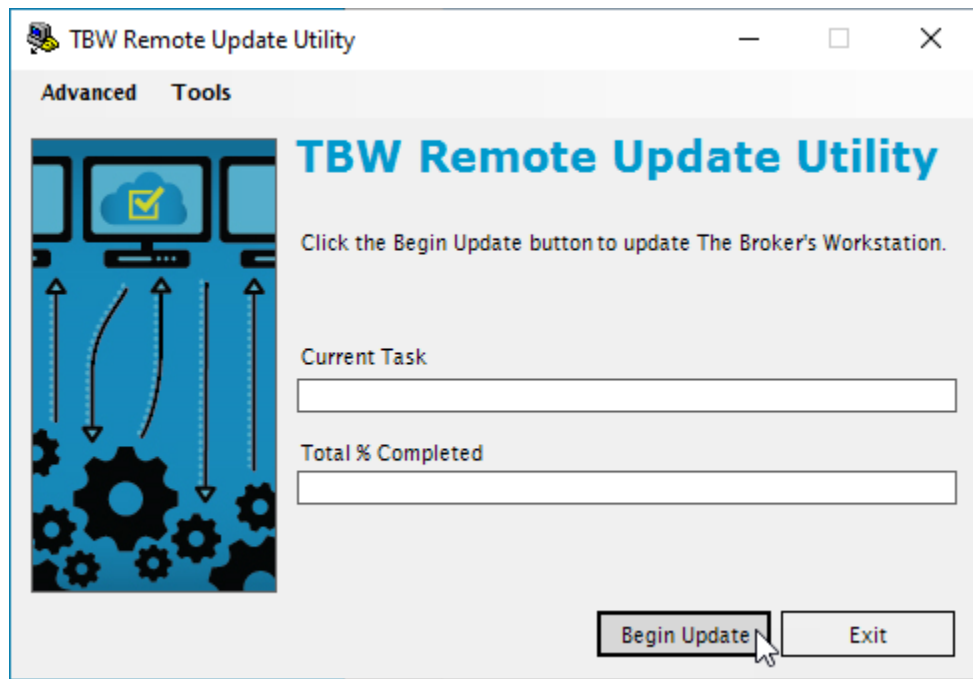
Please note, Class of Business details will be included when the Expiry Report is exported to Excel or printed as an Internal, Broker, or Producer Expiry Report.

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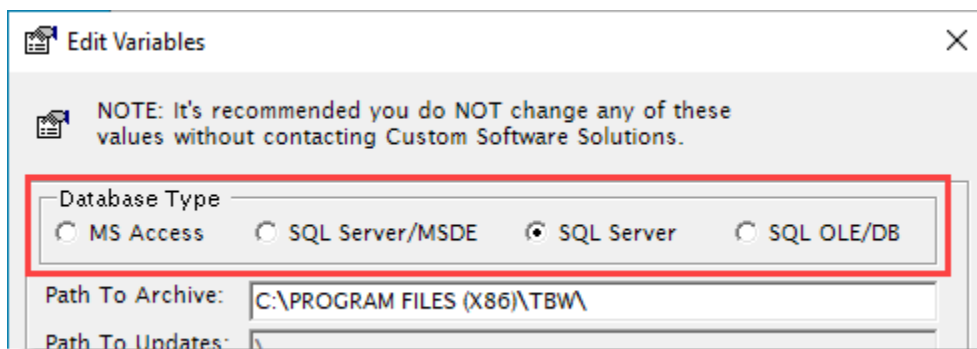
2. Improvements to the TBW Update Utility

Improvements have been made to the TBW Update Utility, and you will notice slight changes to the display.

- Please note, **user workflows and program functionality have not changed** with this enhancement. Please continue to use the Update Utility in the usual way.



If you click **Advanced, Edit Settings** in the Update Utility, the Edit Variables window will open. An additional Database Type option (SQL OLE/DB) is now available in this window. **Note: Please do not make any changes in the Edit Variables window without contacting CSSI Client Services.**



Please share this information with the appropriate TBW and TUW users in your office(s). Once you have reviewed this document, if you have any questions regarding these features or need further assistance in their usage, please contact our Client Services Team at clientservices@cssionline.com or 1-888-291-3588 (toll-free telephone).

Thank you for using The Broker's Workstation and The Underwriter's Workstation.

Yours sincerely,

Custom Software Solutions Inc.



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